Title: Performance Evaluation Metrics System

Member: Bhagyashri Patil

Group Name	Performance Evaluation Metrics System	Date	01/22/2023
Member Name	Bhagyashri Patil	Signature	*Bhagyashri Patil*
Employer:	Valor Compounding Pharmacy Inc.		
Employer Overview:	Valor Compounding Pharmacy is a company based in Berkeley, California, USA; who specializes in manufacturing and providing customized compounded medicines to the users. Custom compounded medicines simply means that if any user has any allergic reaction to any specific drug or any specific component of medication he/she is undergoing, Valor customizes the medication formula by using their pharmaceutical expertise and tried to build a customized medication with new replaced compound in place of the allergic compound and as per the user's specific needs. - These medications are not available over the counter, and they are produced only on prescription request. They even offer a flat-rate pricing structure, which means even if the quantity of dose to be taken by user varies, they will still offer the medications at the same rate, irrespective of the dosage. Apart from this, they also give free shipping once the order is placed by user through online mode, and they have got the fastest turnaround time of 4 days, as compared to other available pharmacies.		
Problem Statement:	Historically, the customer care employees' performance was assessed solely by the number of prescriptions they type. However, their position is multifunctional where they are required to answer phone calls, return phone calls, solve customer service issues, follow-up with doctors' offices and more. The issue is that the sole one metric is not enough to fairly assess their performance and rewards only that one job task. This in turn, creates less performance in all other areas except typing in prescriptions.		
Solution / Goal (Project Statement):	Develop a performance evaluation metrics system for the customer care department		
Project Deliverables:	A series of dashboards in QlikSense that report the following levels: • Data metrics by overall department • Data metrics by role / position within the department • Data metrics by individual within the department		

Data Source:	• Multiple data sources are referred consisting of:	
	Data Metrics	**Data Source**
	Number of Rx Typed	PK
	Number of Phone Calls Answered (Incl. Queue Call Backs) compared to Number of Total Number of Phone Calls that rang in their Queue (That were not disconnected / errors / abandoned)	Five9
	Number of Zendesk Tickets Worked on	Zendesk
	Number of Zendesk Tickets Solved	Zendesk
	Average time to Solve Ticket	Zendesk
	Number of Phone Calls Returned	Five9
	Number of work hours scheduled vs. worked	Homebase
	Percent On-time arrival	Homebase

• Data Timeframe: Referenced from 2018 to till-date

Objectives:	
	1. Build project roadmap and milestones.
	2. Data Collection, ETL, build data relationships and metrices.
	3. Build the evaluation metrics considering all sub-departments and all employee positions under the Customer Care department.
	4. Data modelling and profiling using Snowflake / Talend.
	5. Discuss and build KPIs for the evaluation metrics using QlikSense.
	6. Give hierarchy and role-based access to the dashboards.
	7. Improvise and optimize the custom views/ queries/ metrices using the management feedback.
	8. Embed dashboards, replicate results and findings of metrices on the project website and build video.
	9. Conclude project and wrap-up the project documentation.
	10. Final project submissions.

Project Weekly schedules:	
	Week 1 (01/19):
	• Project statement finalization
	• Project kickoff meeting
	Week 2 (01/26):
	• Business requirements discussion
	• Non-disclosure Agreement (NDA) Sign-off
	Week 3 (02/02):
	• Pre-requisite and software installation

	Week 4 (02/09): Exploratory Data Analysis • Data extraction, transformation, and loading
	Week 5 (02/16): • Data modelling and profiling in Snowflake + Talend • Exploratory Data Analysis
	Week 6 (02/23): • Build custom data views for specific data metrics
	Week 7 (03/02): • Build dashboards and re-iterate
	Week 8 (03/09): • First draft of webpage design with the progress till date • Documentation of all work done till date
	Week 9 (03/16): • Demo the dashboards to all management team.
	Week 10 (03/23): • Note all feedback and finalize the corrections
	Week 11 (03/30): • Re-iterate the modifications and feedback from management
	Week 12 (04/06): • Improvise, optimize the queries, views, dashboards.
	Week 13 (04/13): • Finalize Webpage • Build video
	Week 14 (04/20): • Final project presentation
	Week 15 (04/27): Finalize Project • Project wrap-up • Final project report submission